
Process Number: BP.00.005.01
Approved By: A. Michael Berman
VP for Technology & Communication

Effective Date: 05-August-2011
Page 1 of 6

Business Practice for Project Intake

PURPOSE:

Provide for a uniform process for the intake of T&C projects at CSU Channel Islands.

BACKGROUND:

T&C is required to complete projects in order to support the University mission. To be efficient and effective at planning and managing project activities using the limited resources that are available, T&C must adopt standard practices to guide projects and keep them on target.

The lifecycle of T&C projects is as follows:

- Phase 1. Intake
- Phase 2. Planning
- Phase 3. Execution & Monitoring
- Phase 4. Closure & Hand-Off

BUSINESS PRACTICE:

Accountability:

The VP for Technology & Communication and T&C managers

Applicability:

All T&C employees

Definitions:

- (1) **Operations.** Steady-state T&C activities used to support existing products and services. They are repetitive, with the same outcomes, and are ongoing, with no start or end dates.
- (2) **Project.** A temporary endeavor undertaken to create or update a unique product, service, or result that requires 30 or more hours of total T&C staff time to complete. In particular, a project in T&C is undertaken to create a new service that has not existed before. A project has a definitive beginning and end, and measurable outcomes and results. Projects are further defined by their size and scope.
- (3) **Supervising Manager.** The T&C manager who is ultimately responsible for the project, and has ownership of the project charter.

Process Number: BP.00.005.01
Approved By: A. Michael Berman
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Effective Date: 05-August-2011
Page 2 of 6

Business Practice for Project Intake

- (4) **Project Lead.** The T&C manager or staff member responsible for performing project management tasks for the duration of the project. Depending on the scope and size of the project, the Supervising Manager or Project Management Office staff may serve as project lead and assume day-to-day project management responsibilities.
- (5) **Project Management Office (PMO).** The T&C team responsible for the coordination, support and guidance of T&C projects. This team is led by the Director of IT Strategy.
- (6) **Project Review Board.** A group of T&C employees, designated by the VP for Technology & Communication, that reviews projects and makes recommendations to the VP for Technology & Communication.

Text:

Project Attributes

In general, projects are—

- *Specific.* A project has a specific purpose, set of requirements, and scope of work defined.
- *Measurable.* A project's success can be quantified; both T&C governance and clients can tell when specific milestones or requirements have been met.
- *Approved.* A project shall receive the approval of T&C governance and affected stakeholders so that resources are made available to execute the project. Changes to project timelines or scope shall receive approval from T&C governance and be communicated to affected stakeholders as necessary.
- *Realistic.* Projects can be completed with resources that are, or will be made available. Resources include time, funding, goodwill and knowledge.
- *Time-bound.* Projects are temporary, and have definitive start and end dates.

In contrast, operations are everyday business processes. They are repetitive, with the same outcomes, and are ongoing, with no start or end dates. Operations support activities typically are completed in 30 hours or less. It is the responsibility of the T&C manager to determine if a set of activities constitutes a project or not.

Process Number: BP.00.005.01
Approved By: A. Michael Berman
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Effective Date: 05-August-2011
Page 3 of 6

Business Practice for Project Intake

Project Classes

T&C projects shall be categorized into 4 classes. Classes are determined based on the total risk score, which is calculated from factors including resources required, impact and complexity. Project class shall be documented in the Project Charter.

Description	Project Size / Complexity	Total Risk Score
Class 1	Small / Simple	0-7 points
Class 2	Medium / Medium	8-14 points
Class 3	Large / Complex	15-21 points
Class 4	Extra large / Very complex	22-30 points

Please refer to the rubric listed in Project Charter Form, Step 8 for criteria and calculations.

Project Intake Lead Time

All new project requests submitted to T&C must include sufficient lead time to complete the project intake and approval process. Actual lead time required depends on the size and complexity of project, as well as the availability of resources to complete project intake activities. Minimum lead time for all Class 3 and above projects is 4 weeks (6 weeks recommended). There is no minimum lead time for Class 1 and 2 projects, although 4 weeks is recommended.

Phase 1 - Intake

The T&C project management process begins with the Intake Phase. Project intake consists of the following steps:

- (1) A request for a new project is received by T&C either through formal, semi-formal or informal means.
- (2) A T&C manager is assigned as Supervising Manager to the project request by the VP for Technology & Communication.
- (3) The Supervising Manager (or VP for Technology & Communication) selects the Project Lead. The Project Lead may be the Supervising Manager, or a designee.
- (4) The Supervising Manager reviews the initial request, meets with the project's client, and determines whether to proceed, postpone, or cancel the request.
- (5) The Supervising Manager (or Project Lead) gathers information necessary to complete the Project Charter, completes the Project Charter form, and submits it to the Project Management

Process Number: BP.00.005.01
Approved By: A. Michael Berman
VP for Technology & Communication

Effective Date: 05-August-2011
Page 4 of 6

Business Practice for Project Intake

- Office. The submission of a Project Charter implies the Supervising Manager's approval for the project to proceed as described in the charter.
- (6) The PMO adds the project charter to the T&C Project Repository and project calendar.
 - (7) The PMO reviews the Project Charter and may refer the Charter back to the Supervising Manager for additional information.
 - (8) Supervising Manager completes required project management and approval tasks.
 - a. Class 1 or Class 2 projects need no further approval; the approval of the submitting Supervising Manager is all that is required to proceed.
 - b. Class 3 and 4 projects must be reviewed by the Project Review Board and approved by the VP for Technology & Communication. In addition, Class 3 and 4 projects may require additional review and approval outside of T&C, at the discretion of the VP for Technology & Communication.
 - (9) The PMO shall meet regularly with the VP for Technology & Communication to review submitted projects and their approval status.
 - (10) The PMO shall note the approval in Project Repository and the project may proceed to the next phase.
 - a. Class 1 and 2 projects may proceed directly to Phase 3 (Execution & Monitoring); however, completing Phase 2 (Planning) activities is recommended to ensure project success.
 - b. Class 3 and 4 projects must complete all Phase 2 planning activities required for projects of their scope.

Process Number: BP.00.005.01
Approved By: A. Michael Berman
VP for Technology & Communication

Effective Date: 05-August-2011
Page 5 of 6

Business Practice for Project Intake

Exhibits

Project Intake Flowcharts: <http://www.csuci.edu/tc/projects/it-project-process.htm>

Project Repository and Calendar: <http://sharepoint/sites/its/SiteDirectory/ait-projects>

The following documents are incorporated by reference. Please visit www.csuci.edu/tc/projects/ for the latest versions.

[Project Charter Form \(in Word format\)](#)

Related Resources

Business Process on Project Planning

Business Process on Project Execution & Monitoring

[Business Process on Project Close \(in Word format\)](#)

Process Number: BP.00.005.01
Approved By: A. Michael Berman
VP for Technology & Communication

Effective Date: 05-August-2011
Page 6 of 6

Business Practice for Project Intake

Assessment Requirements

Assessment requirements and history are listed in the grid below.

Description	Frequency	Role Assigned
Report on number of new projects added	Annual	Director of IT Strategy
Review of business practice	Annual	Director of IT Strategy

Revision History

BP Nbr:	BP-00-005	Enacted Date:	08/05/2011		
Revision Nbr:	001	Revision Date:	08/05/2011	Revised By:	PMosinskis
	002		11/13/2012		NFisch